**FIG. 1**

Client Module
122

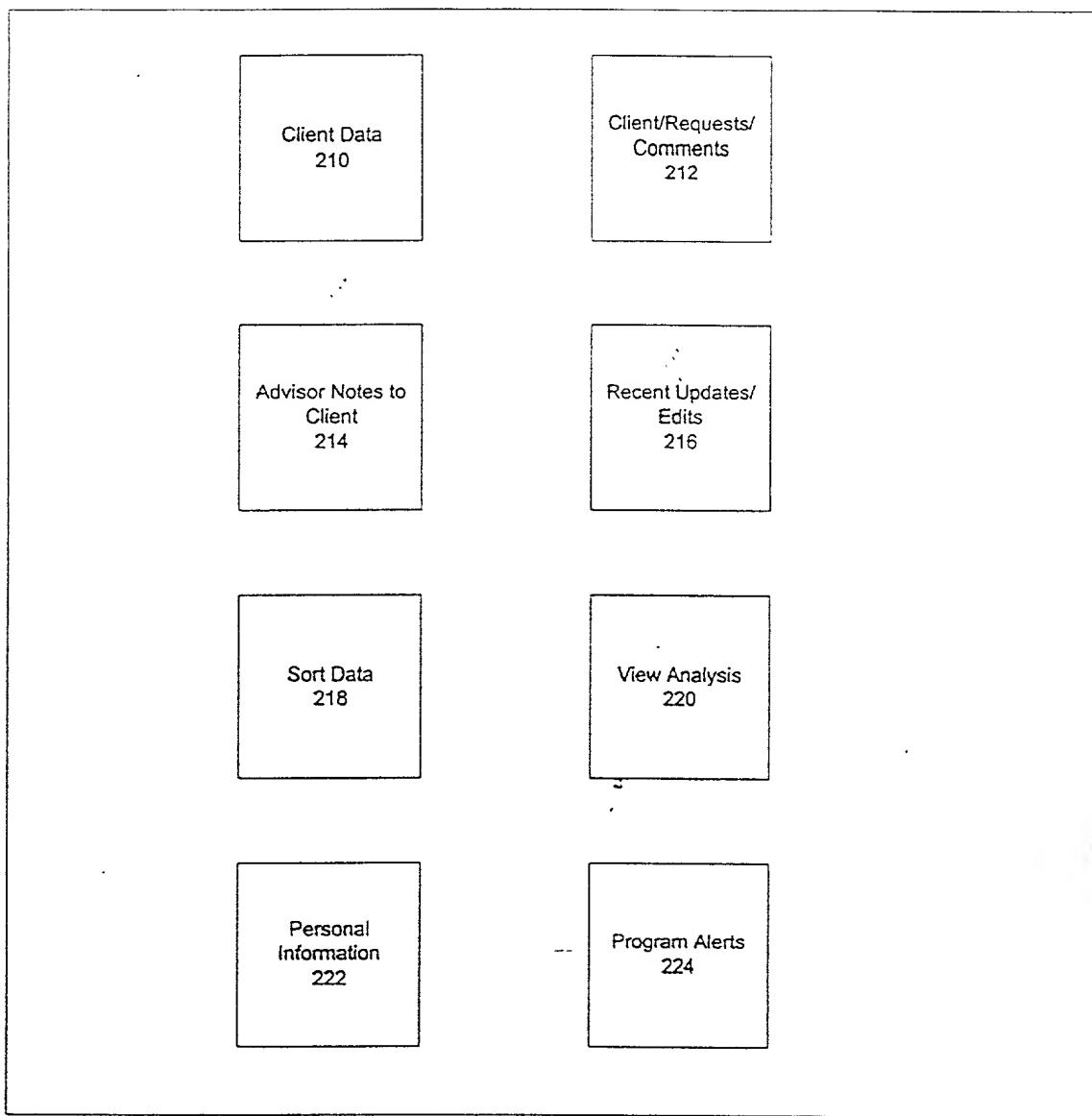


FIG. 2

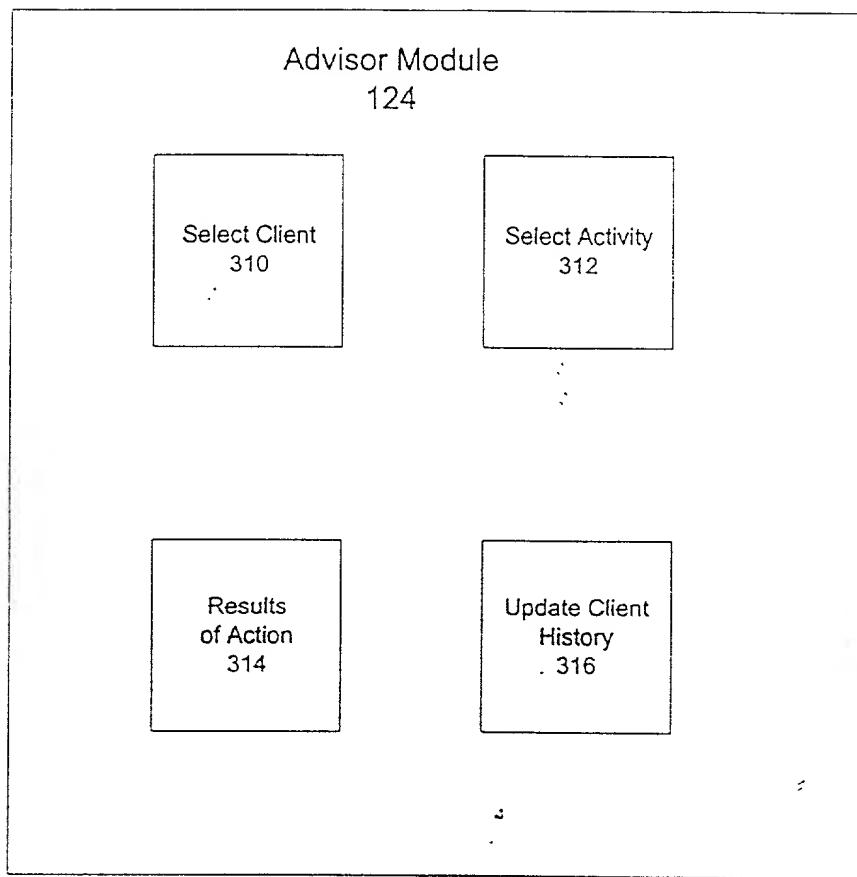


FIG. 3

Collaboration Module 126

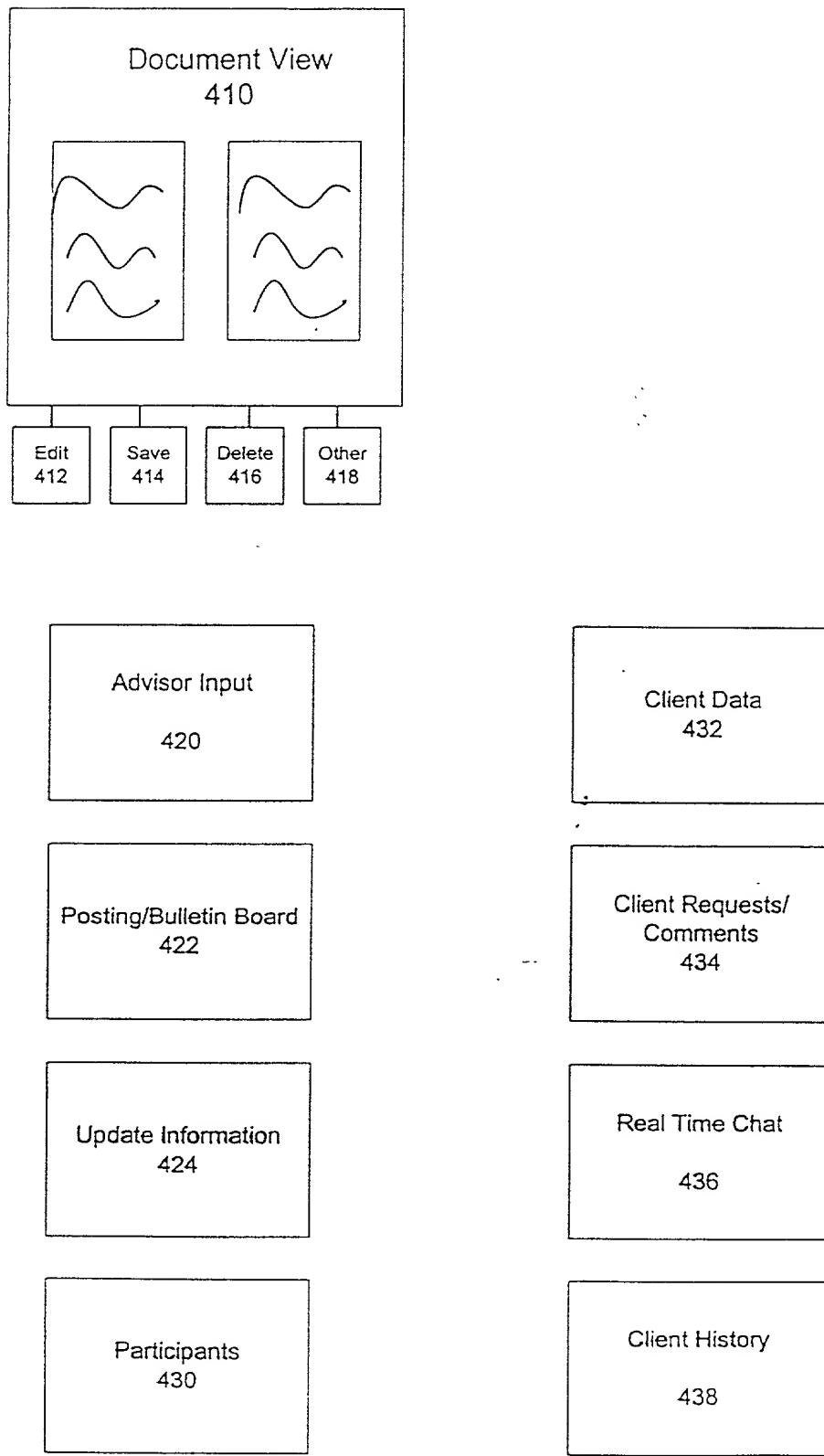


FIG. 4

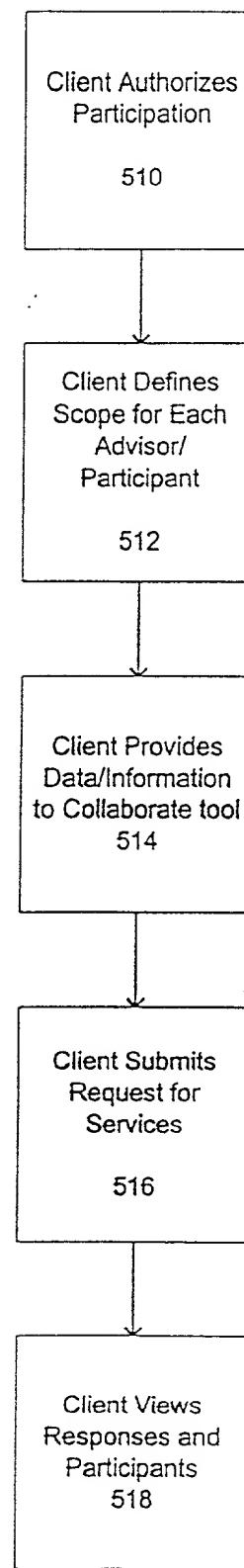


FIG. 5

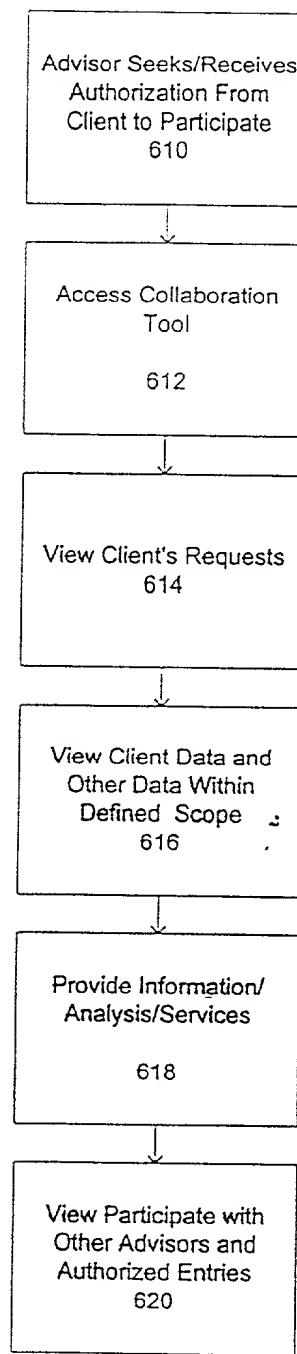


FIG. 6

Sign Up Request

Please Fill in the following (all are required). When you are done, press "Next" to continue.

- I am an **advisor** and would like to join the next generation of financial advisors
- I am a **client** and would like to build my own powerful financial advisory team

Personal Information about yourself:

First Name
Last Name
Address
City
State
Zip
Phone Number
Email Id

Next *704*

702

FIG. 7

Adviser Module 122

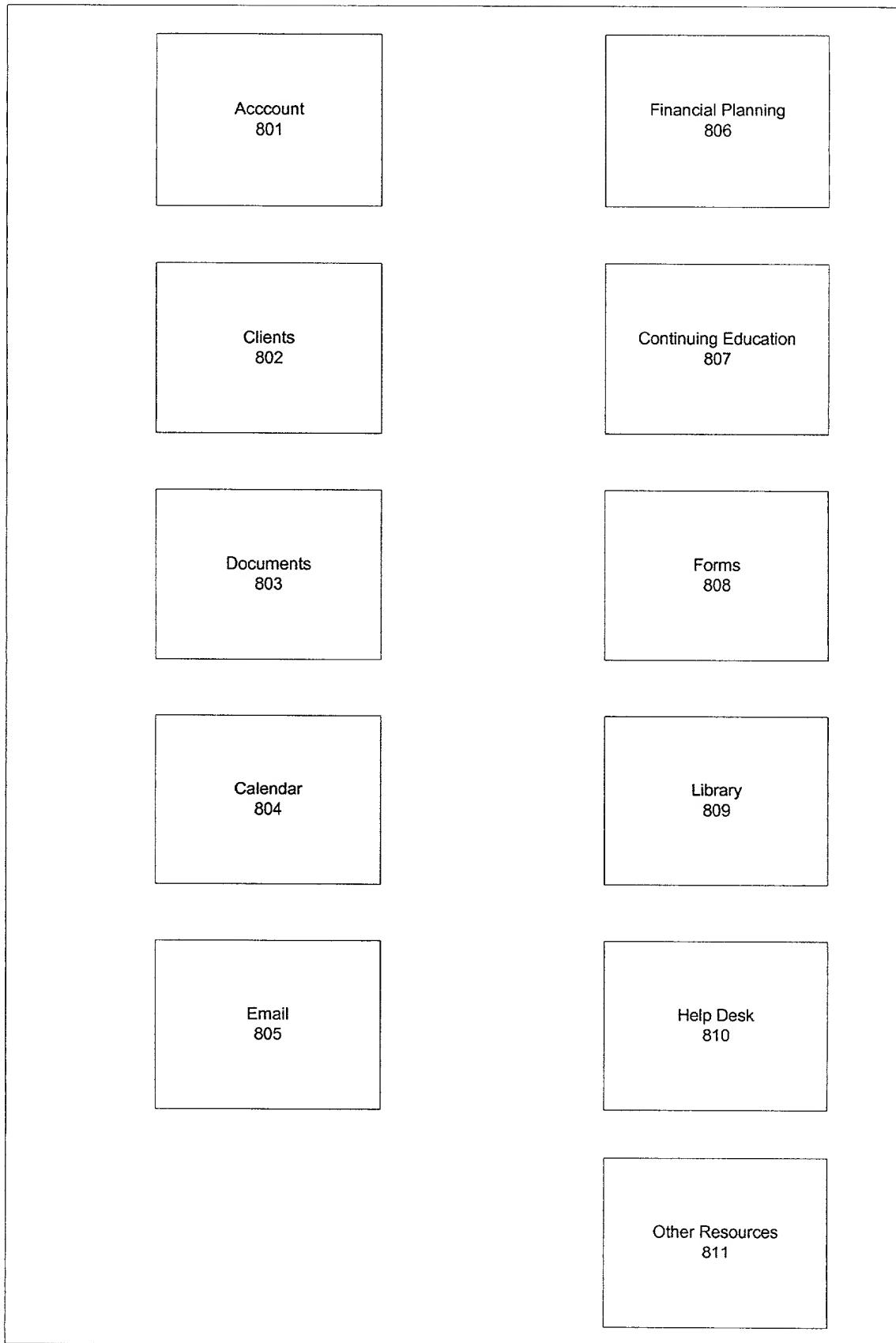


FIG. 8

Client Module 120

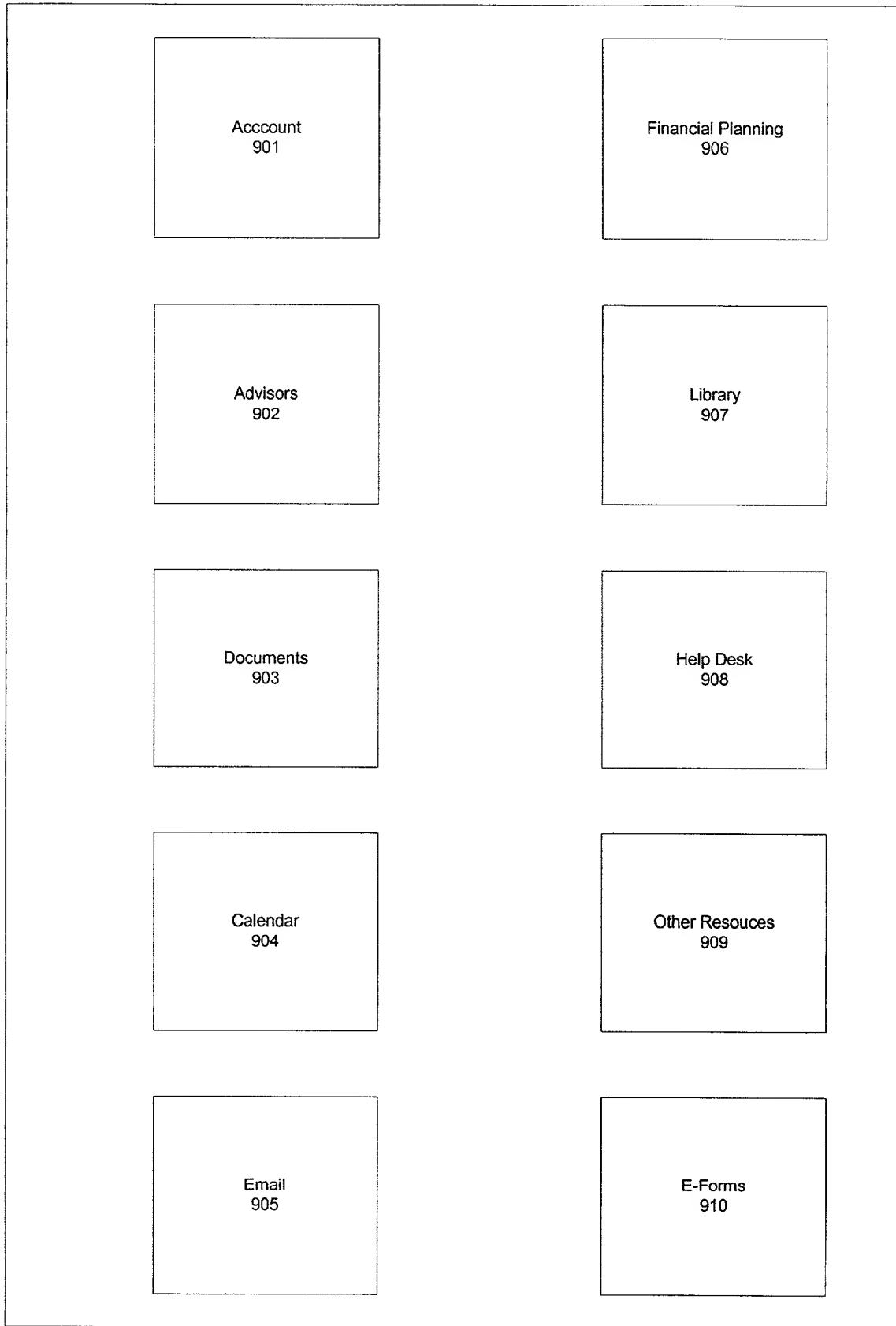
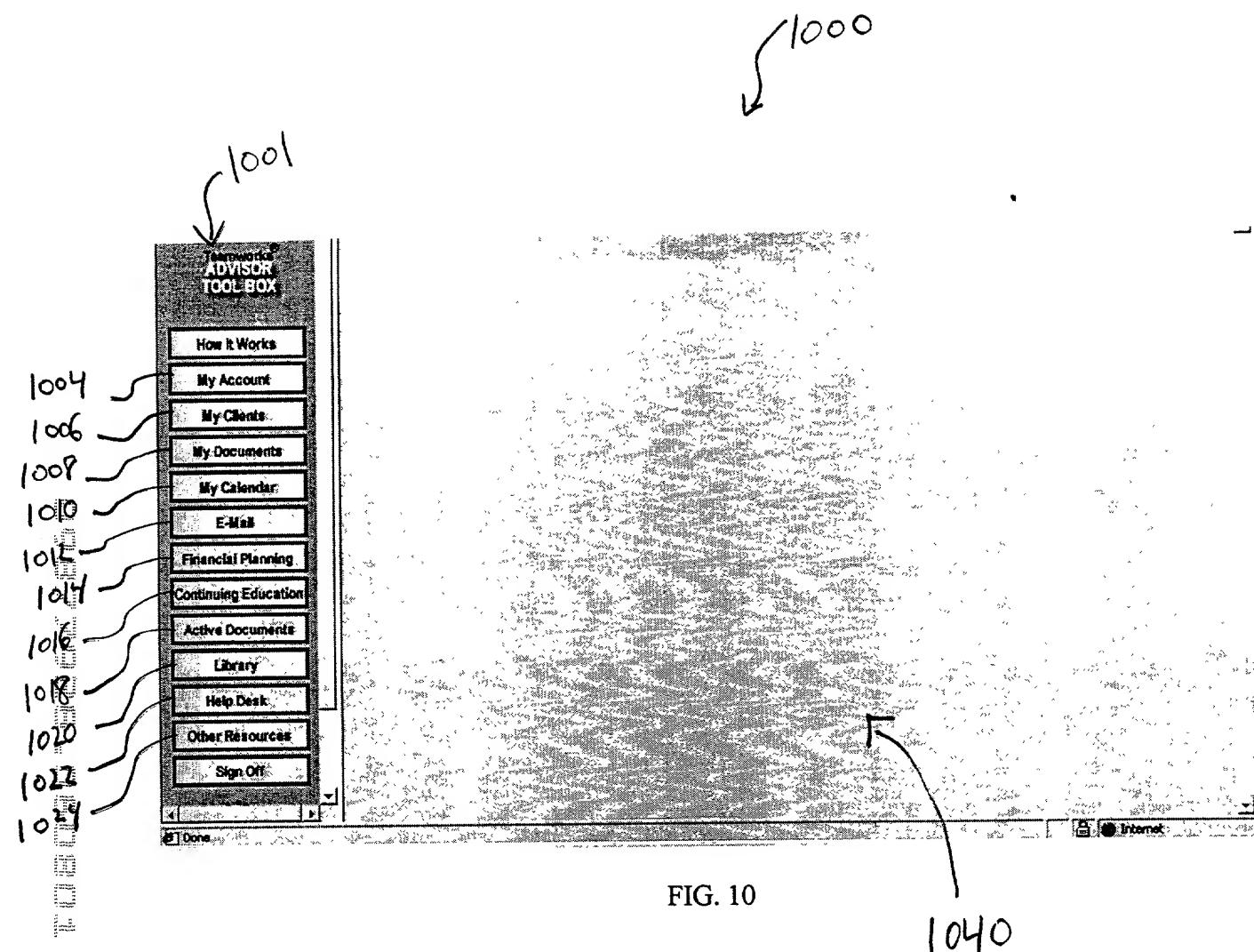


FIG. 9



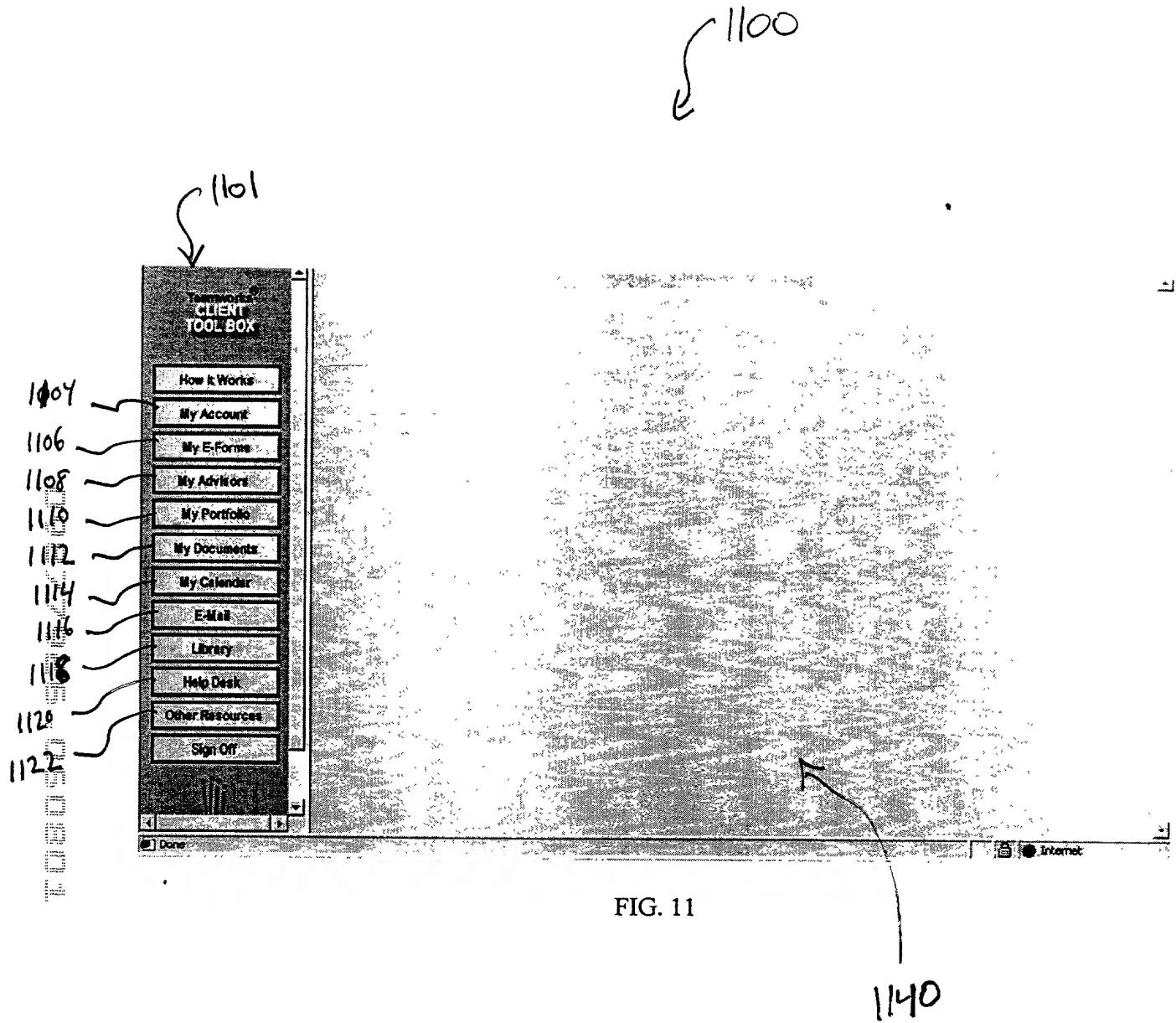


FIG. 11

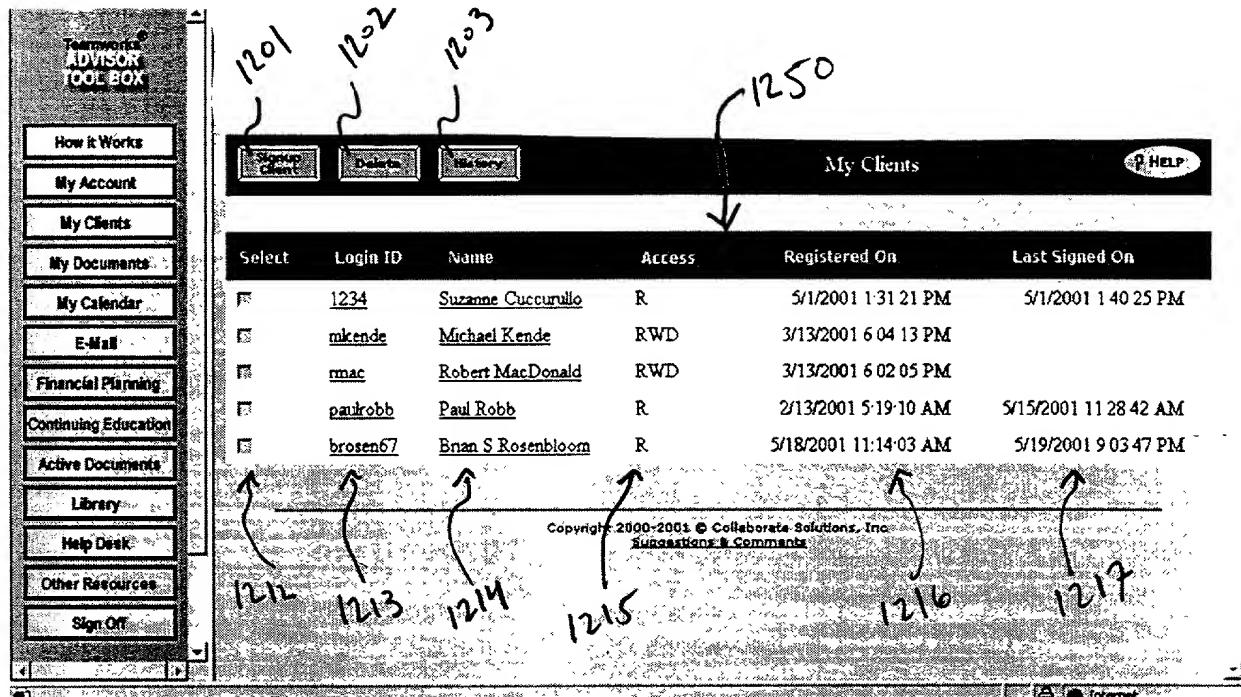


FIG. 12

1300

Registration Information (Only fields marked with * are required)

Name (First Middle Last)

Email Address

Login Information

Logon ID

Password

Re-enter Password

Billing Information

The charges for this client (\$6/mo.) will be added to your bill.

Discount I would like to pay by the month (at the price shown above)
 I would like to receive a 20% discount by paying for a full year

1304

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[Suggestions](#) [Comments](#)

Done Internet

FIG. 13

1400

1402

1410

The screenshot shows the 'My Advisors' section of the Teamworks Client Tool Box. The interface includes a sidebar with links like 'How It Works', 'My Account', 'My E-Forms', 'My Advisors', 'My Portfolio', 'My Documents', 'My Calendar', 'E-Mail', 'Library', 'Help Desk', 'Other Resources', and 'Sign Off'. The main content area is titled 'My Advisors' and displays a table with two rows of advisor information. The table columns are 'Action', 'Name', 'Access', 'Description', and 'Last Signed On'. The first row shows 'Delete', 'History' (highlighted in yellow), 'Jane A Does', 'ALLOW', and '5/19/2001 10:07:23 PM'. The second row shows 'Delete', 'History', 'James G Gatto', 'ALLOW', and '5/19/2001 10:07:23 PM'. Below the table, there are links for 'Add Advisor' and 'If your advisor is not online yet: Click Here'. The bottom of the page includes a copyright notice for 'Collaborate Solutions, Inc.' and links for 'Suggestions & Comments' and 'Internet'.

Action	Name	Access	Description	Last Signed On
Delete	History	Jane A Does	ALLOW	5/19/2001 10:07:23 PM
Delete	History	James G Gatto	ALLOW	5/19/2001 10:07:23 PM

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Suggestions & Comments
Internet

FIG. 14

Name Search:

Adviser's Name

1502

Specialty (select one or more optional)

- Attorney
- Accountant
- 1503
- .
- .
- Financial Planner

State (optional)

City (optional)

1504

1505

Search

1506

Specialty Search

Specialty (select one or more)

- Attorney
- Accountant
- 1507
- .
- .
- Financial Planner

State (optional)

City (optional)

1508

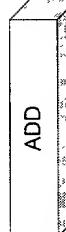
1509

Search

1511

FIG. 15

1600

Name	Specialty	State	City	Description	Action
John Doe	Attorney	DC	Washington	AV Rated	 1602
Jane Does	Accountant	DC	Washington	CPA	 1602
John Doe	Financial Planner	DC	Washington		 1602

Done

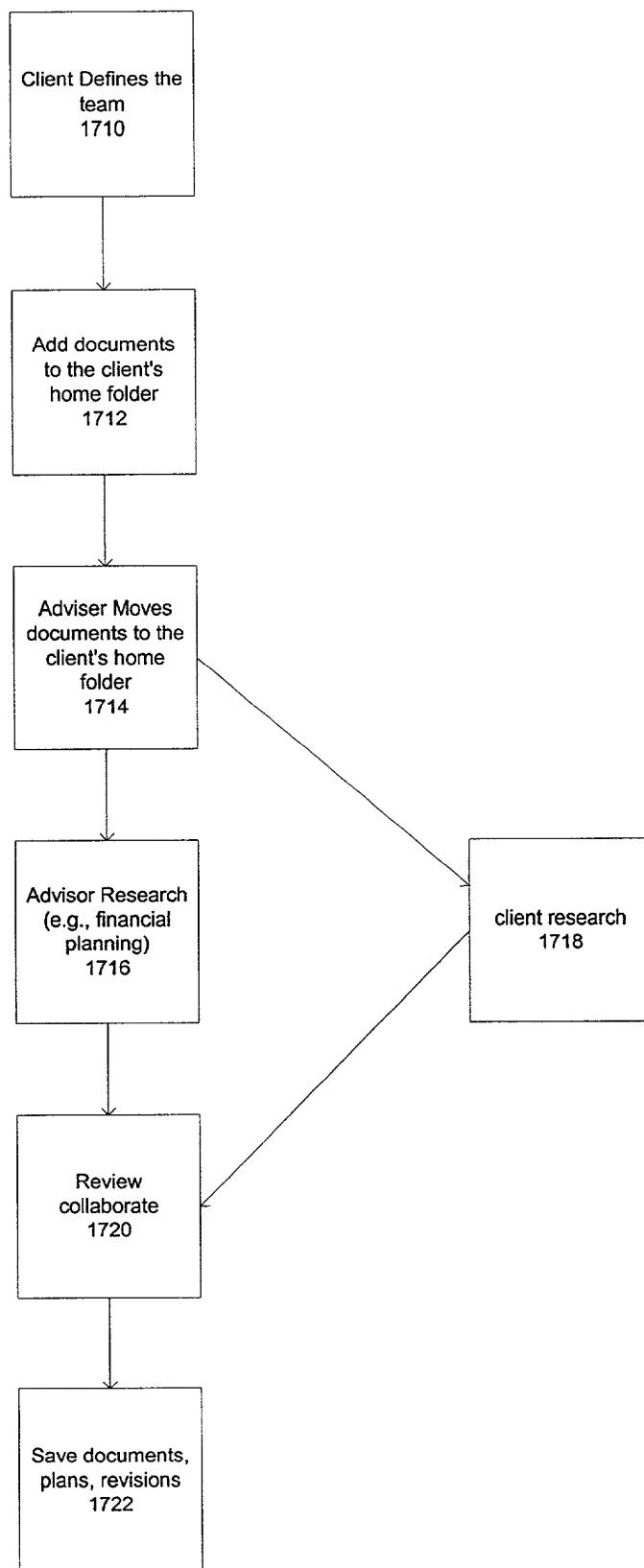


FIG. 17

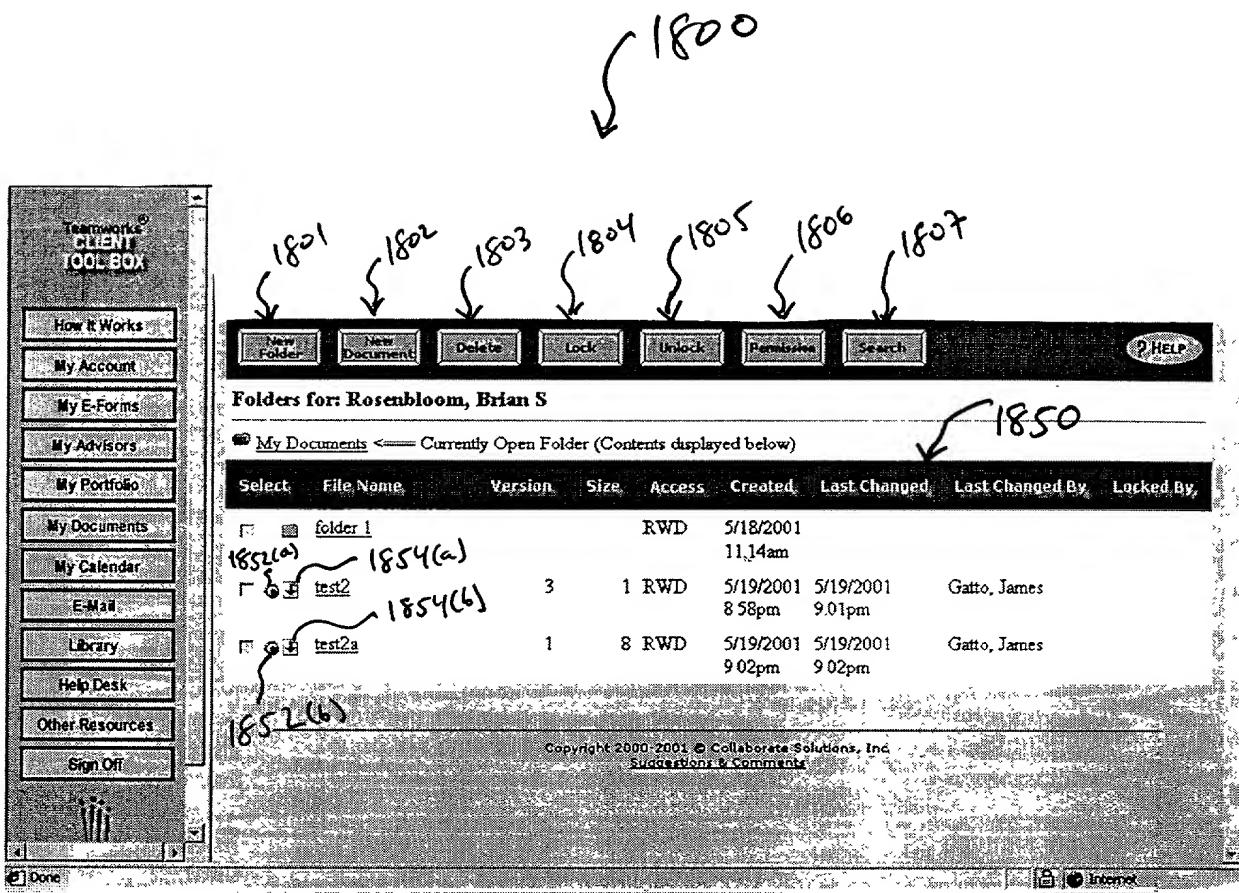


FIG. 18

1900

Add Document

Folder to add document: My Documents

1910

Select document to upload:

1902

Select File Remove File

1912

Document Name: 1989

Email notification?

Comments

1990

1914

OK Cancel

FIG. 19

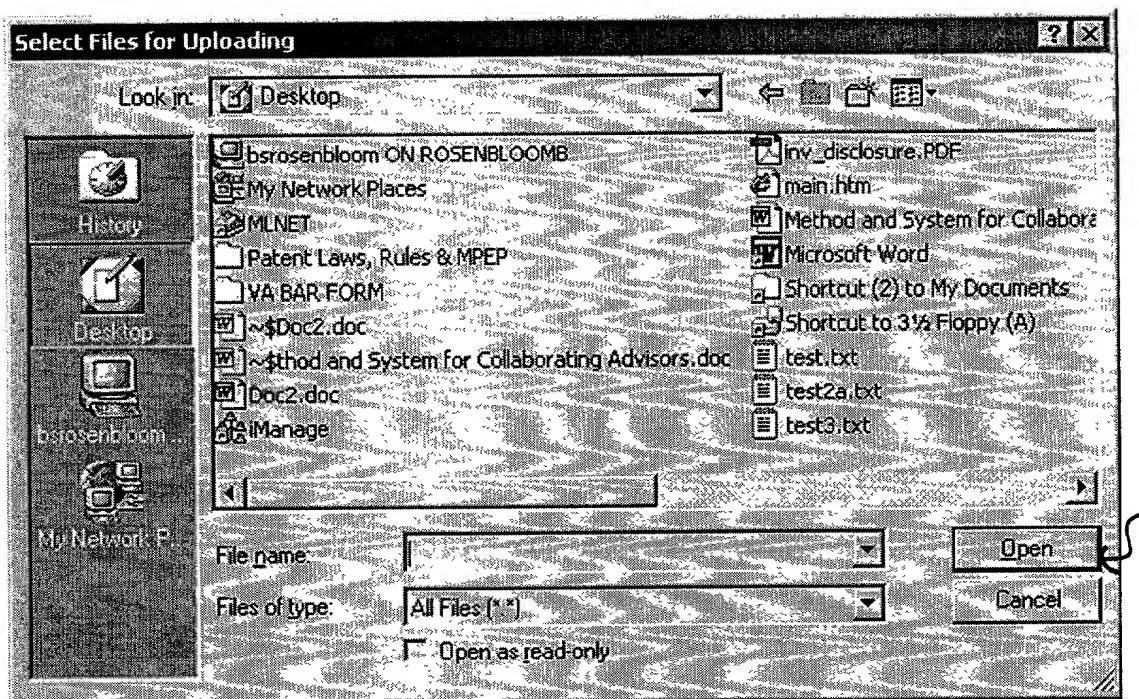


FIG. 20

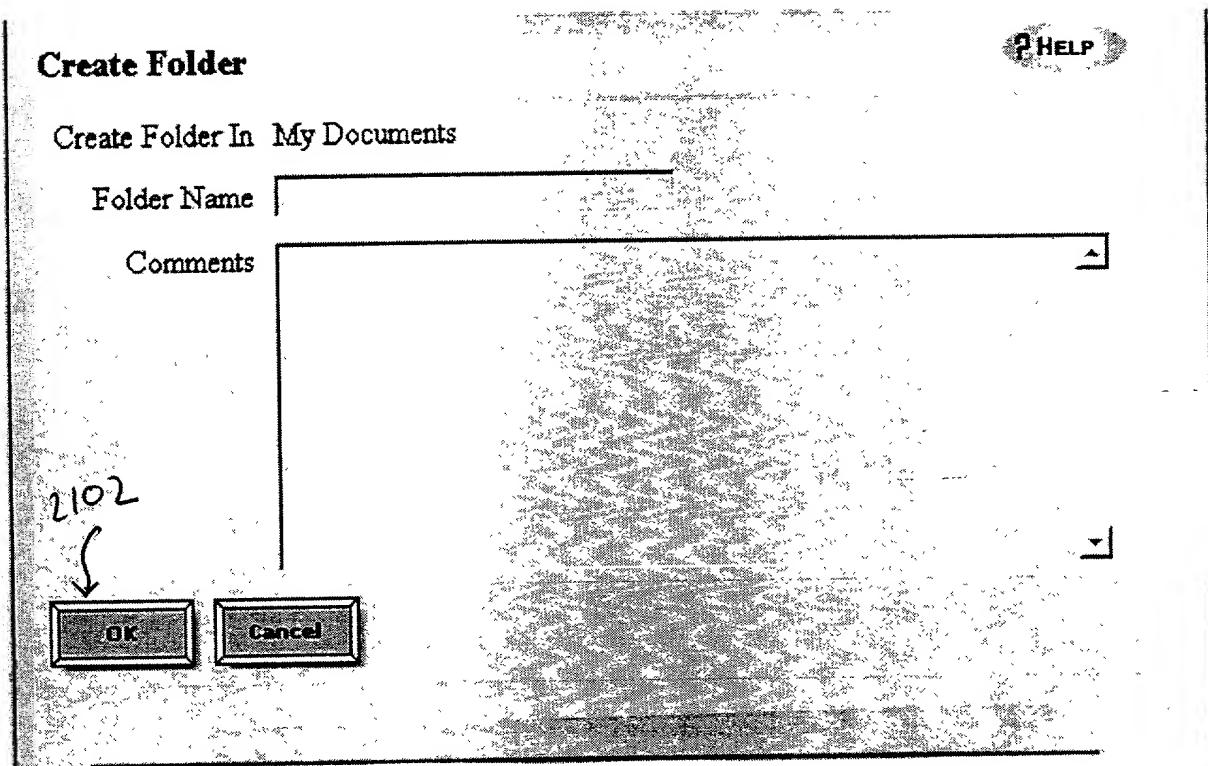


FIG. 21

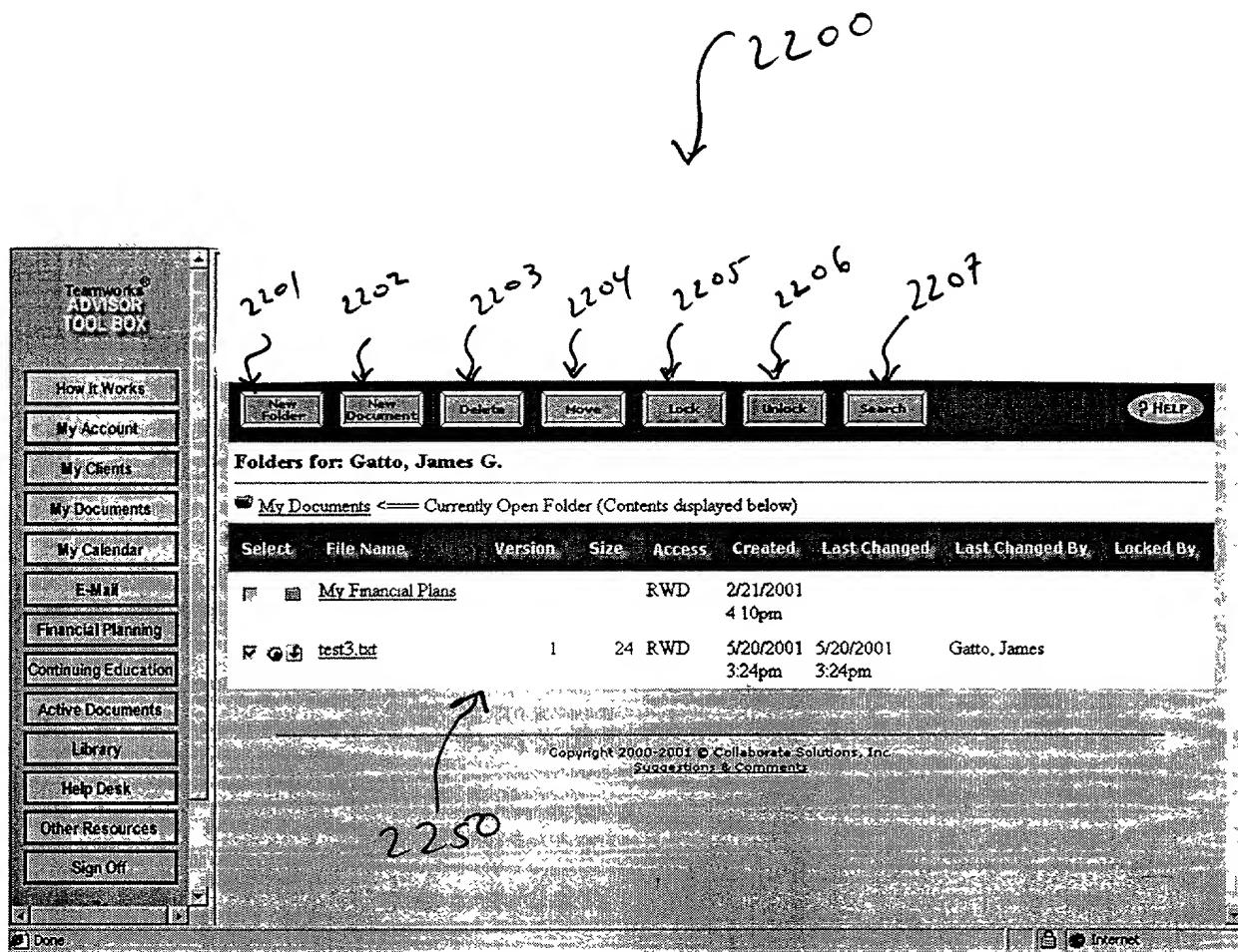


FIG. 22

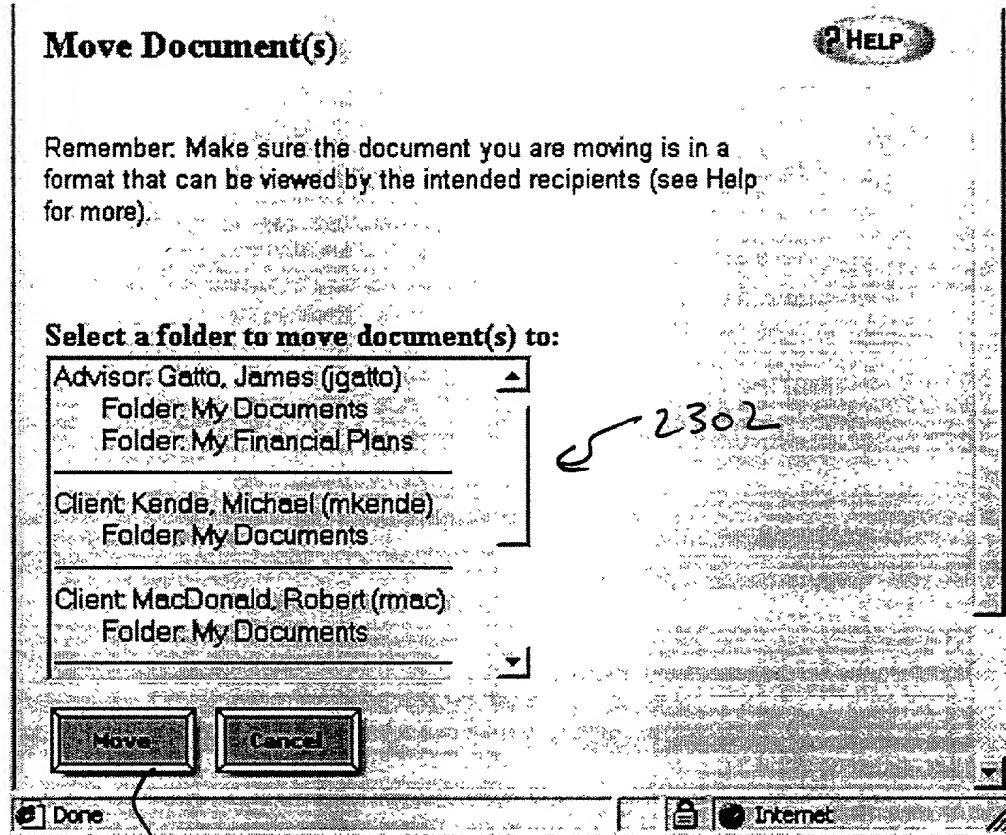


FIG. 23

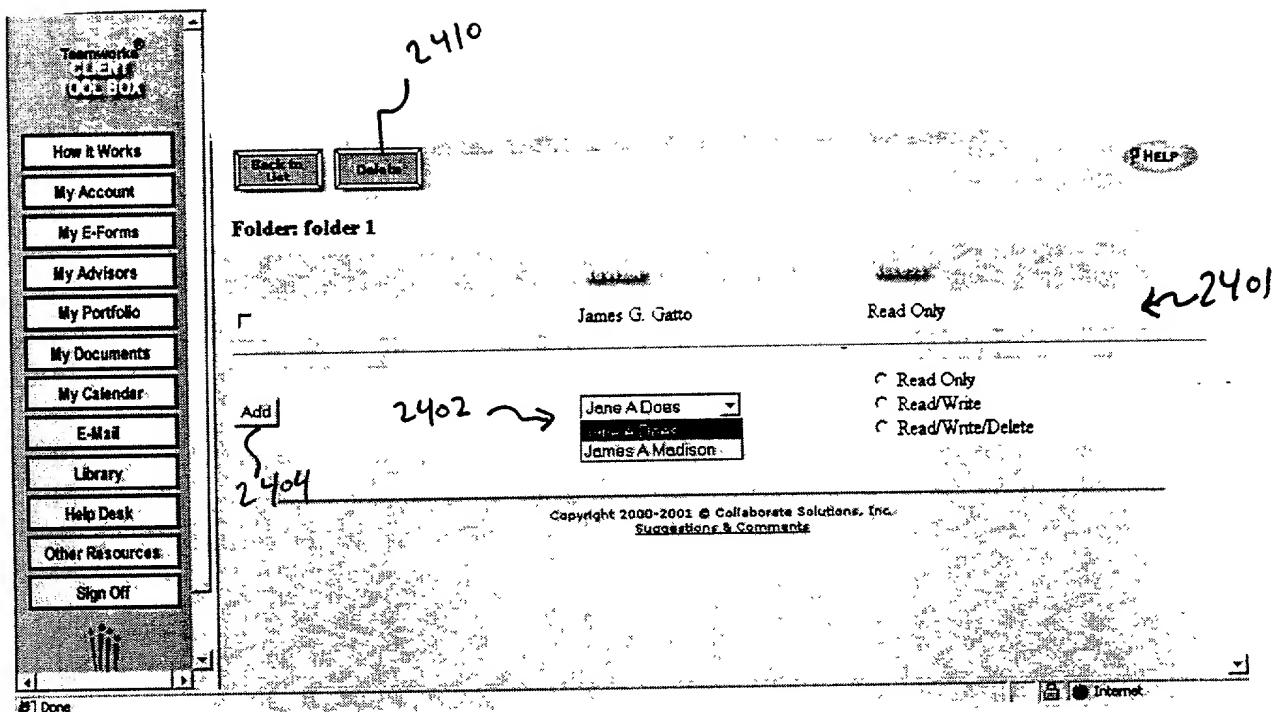


FIG. 24

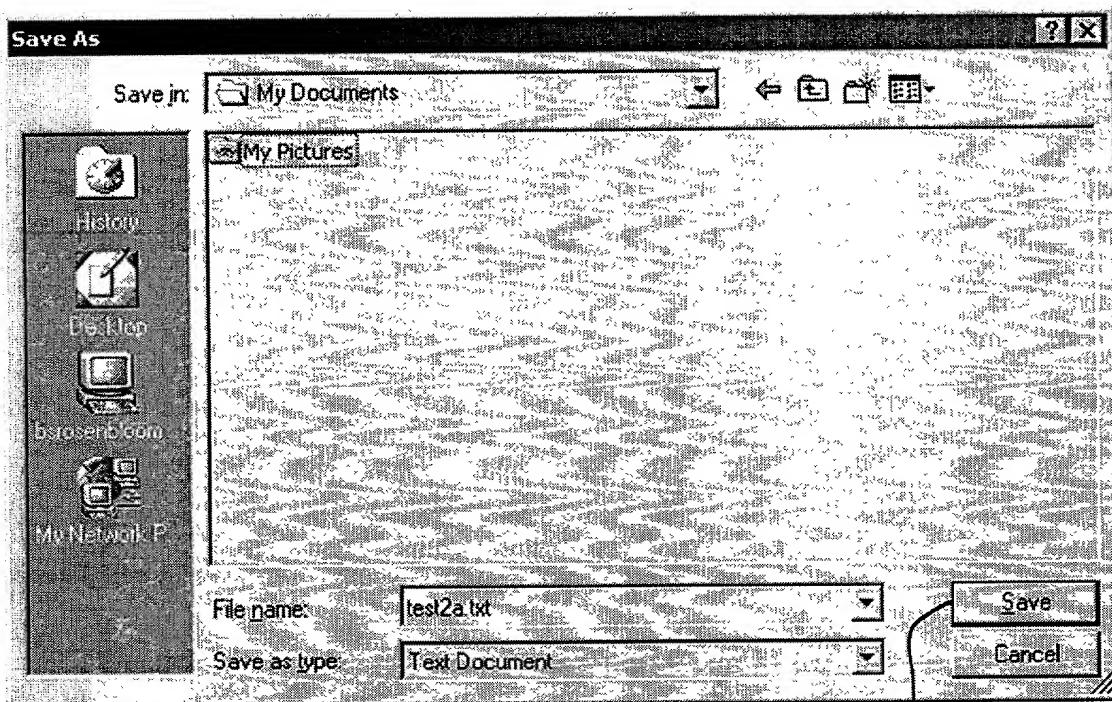


FIG. 25

2502

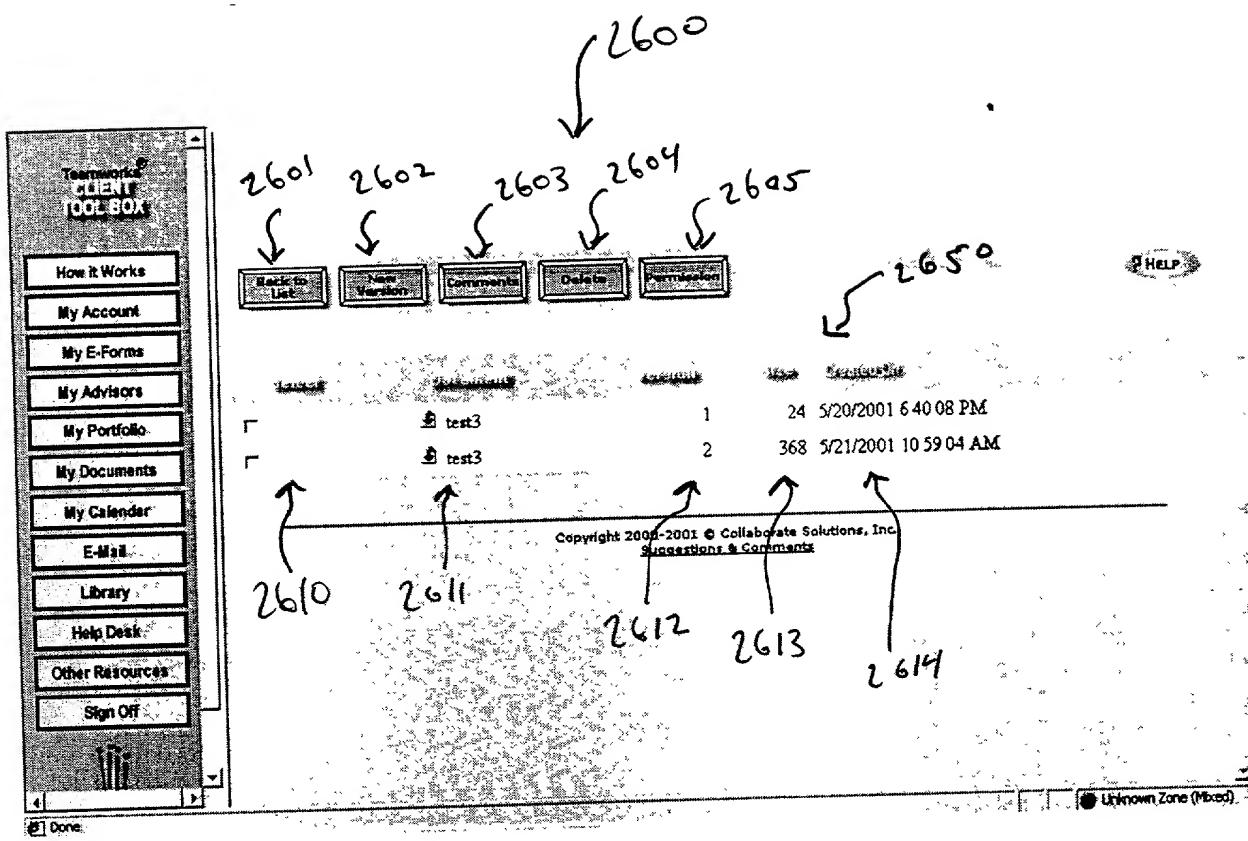


FIG. 26

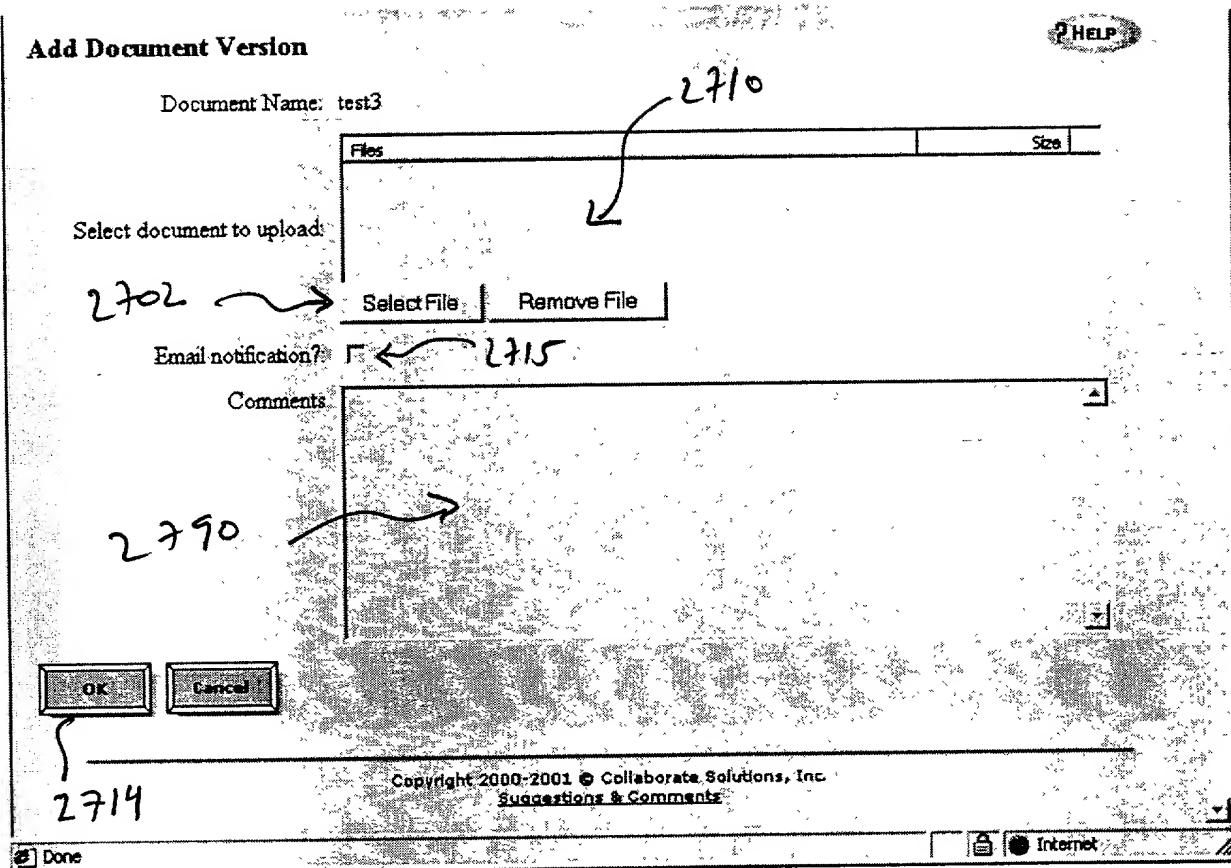


FIG. 27

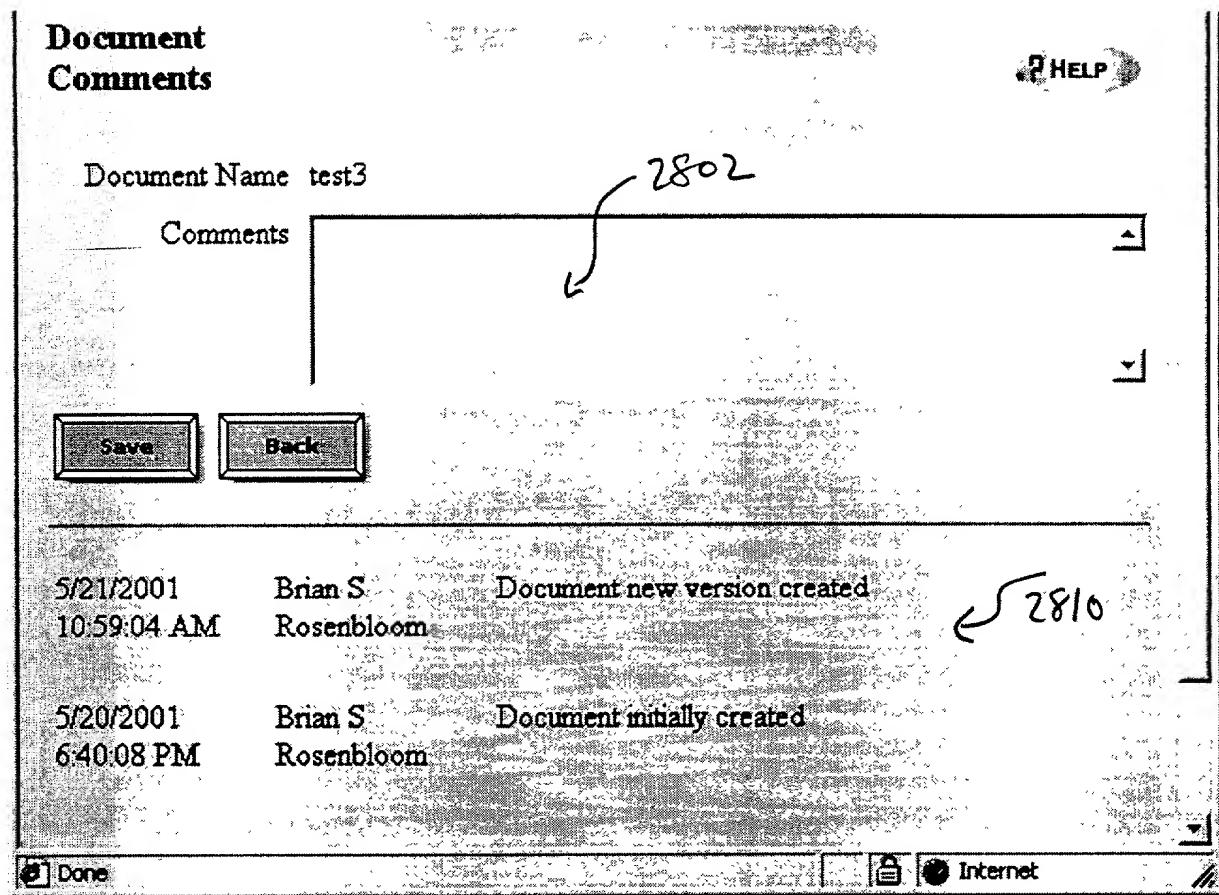


FIG. 28

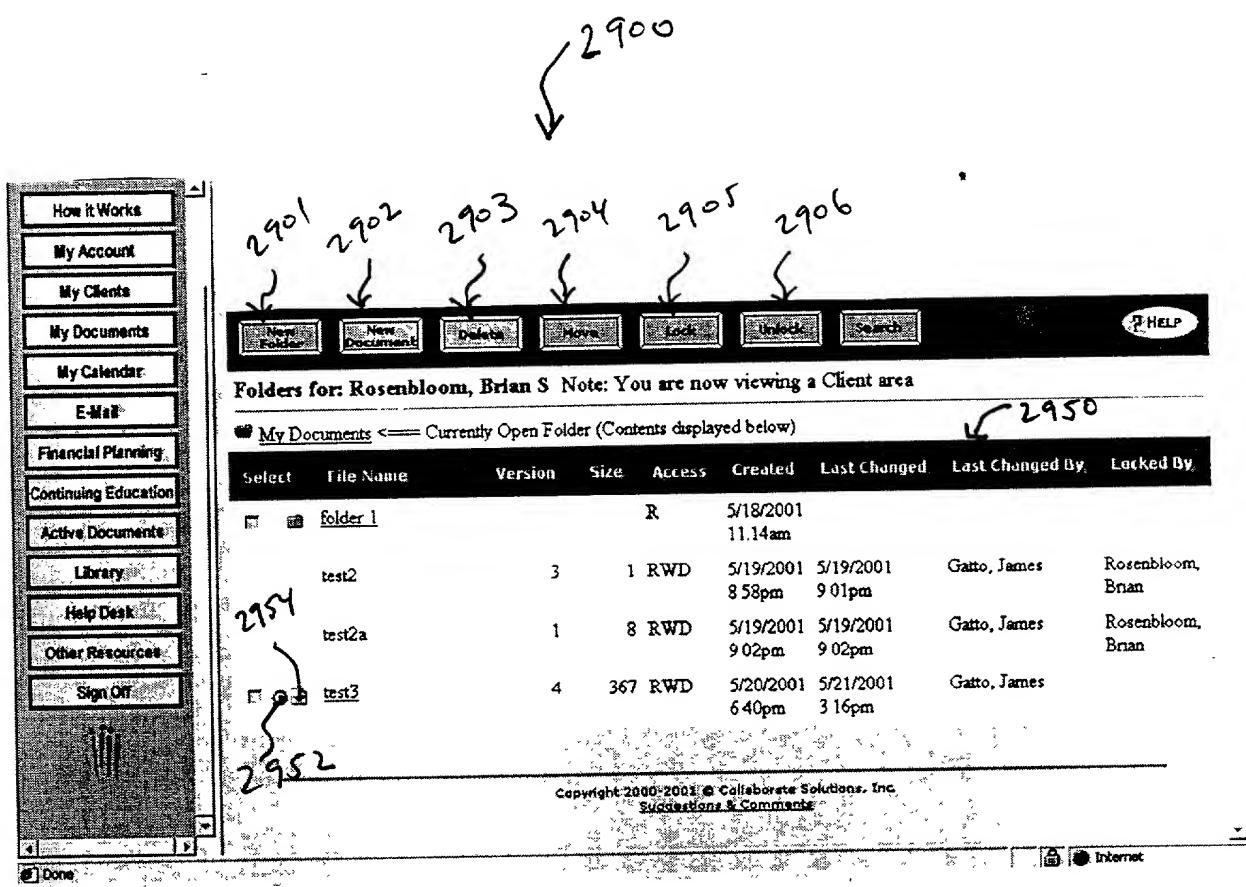


FIG. 29

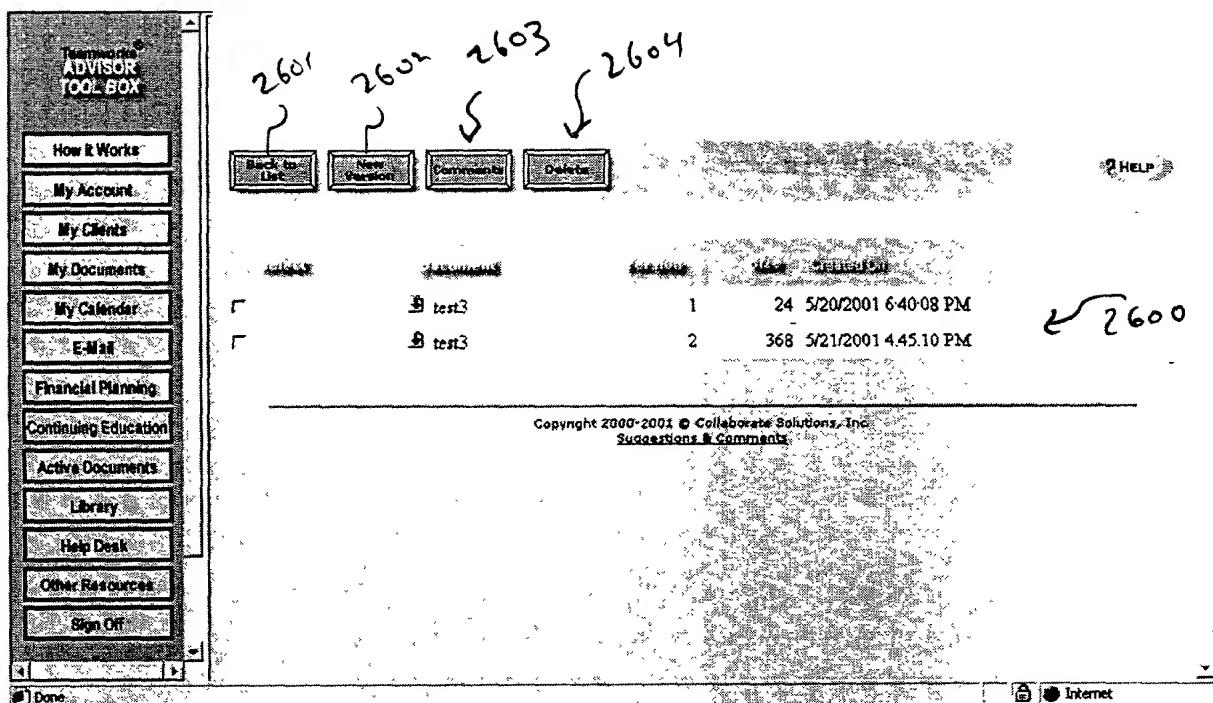


FIG. 30

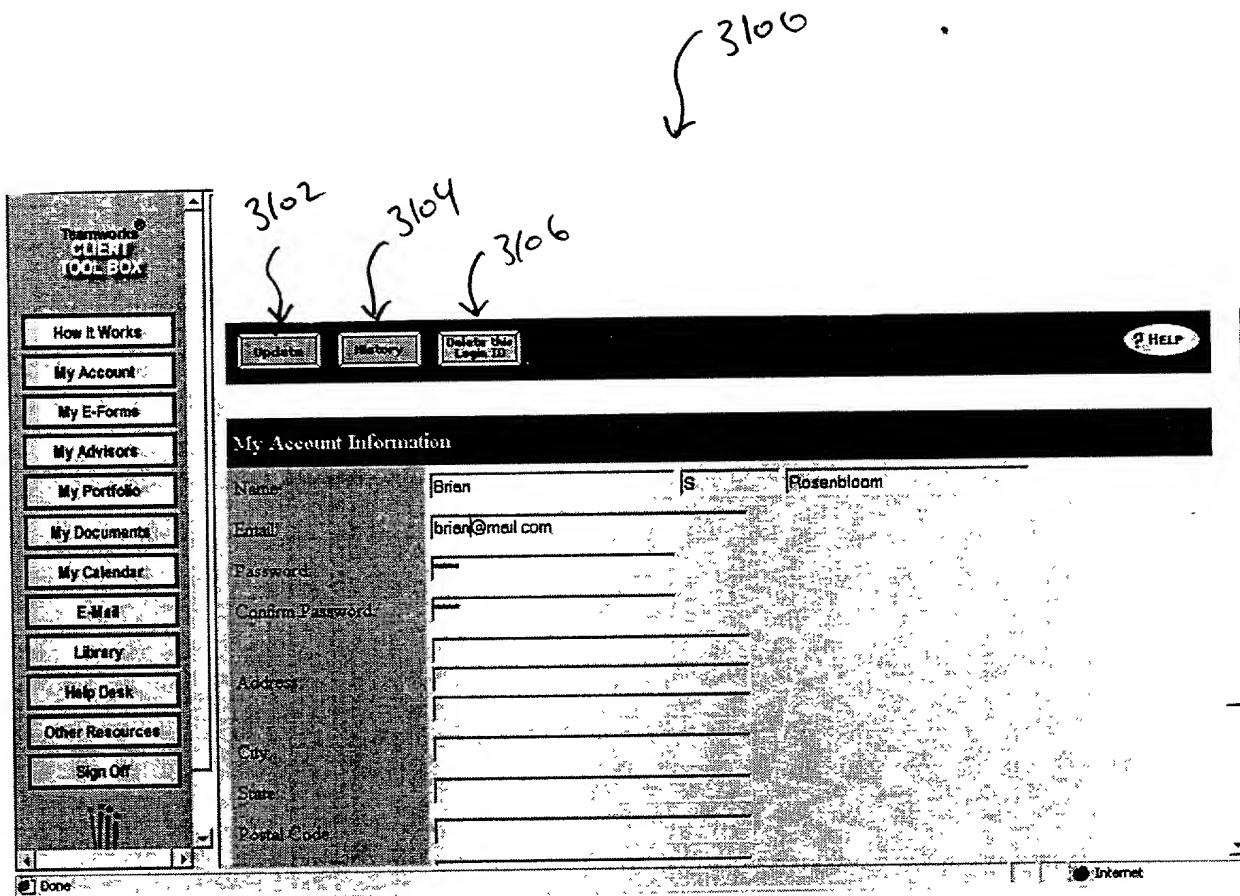
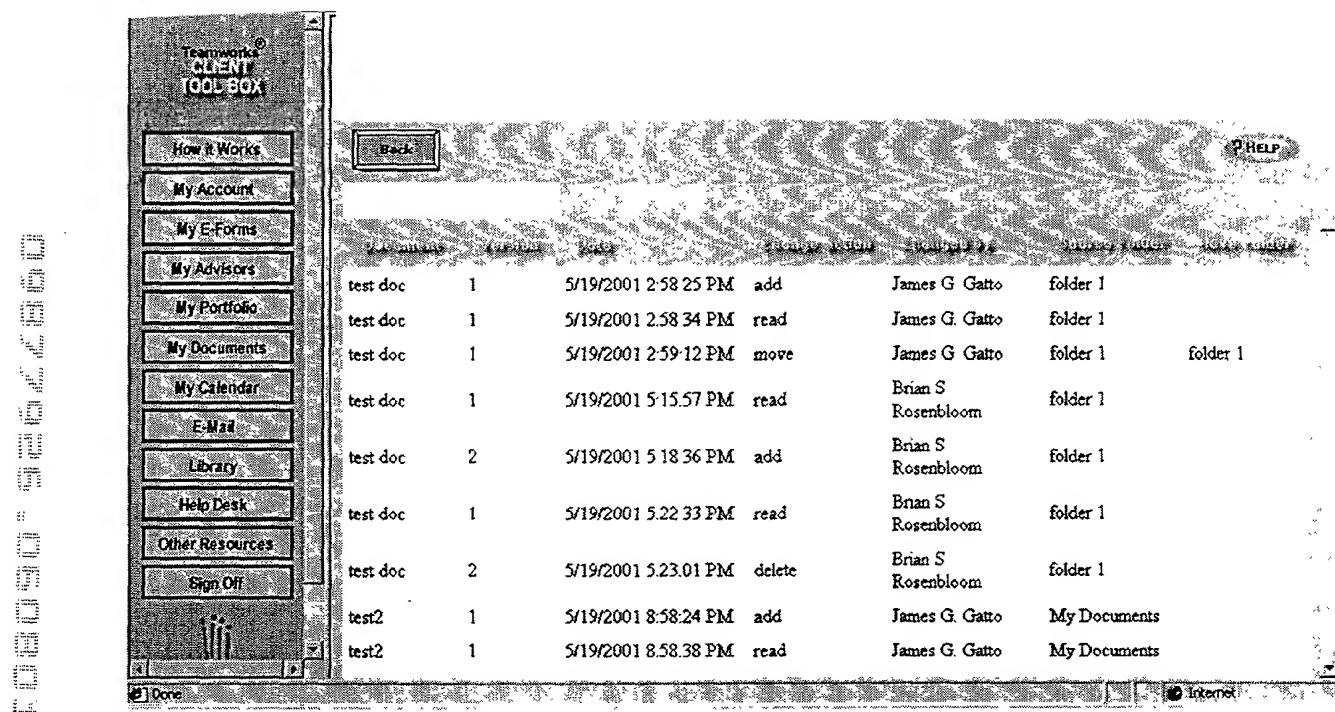


FIG. 31

32°



The screenshot shows a software interface titled 'Temworks® CLIENT TOOL-BOX'. On the left is a vertical menu bar with the following items: How it Works, My Account, My E-Forms, My Advisors, My Portfolio, My Documents, My Calendar, E-Mail, Library, Help Desk, Other Resources, and Sign Off. The 'My Documents' item is highlighted. The main area displays a table of document actions:

Action	Count	Date	Action Type	Owner	Folder
test doc	1	5/19/2001 2:58:25 PM	add	James G. Gatto	folder 1
test doc	1	5/19/2001 2:58:34 PM	read	James G. Gatto	folder 1
test doc	1	5/19/2001 2:59:12 PM	move	James G. Gatto	folder 1
test doc	1	5/19/2001 5:15:57 PM	read	Brian S. Rosenbloom	folder 1
test doc	2	5/19/2001 5:18:36 PM	add	Brian S. Rosenbloom	folder 1
test doc	1	5/19/2001 5:22:33 PM	read	Brian S. Rosenbloom	folder 1
test doc	2	5/19/2001 5:23:01 PM	delete	Brian S. Rosenbloom	folder 1
test2	1	5/19/2001 8:58:24 PM	add	James G. Gatto	My Documents
test2	1	5/19/2001 8:58:38 PM	read	James G. Gatto	My Documents

FIG. 32

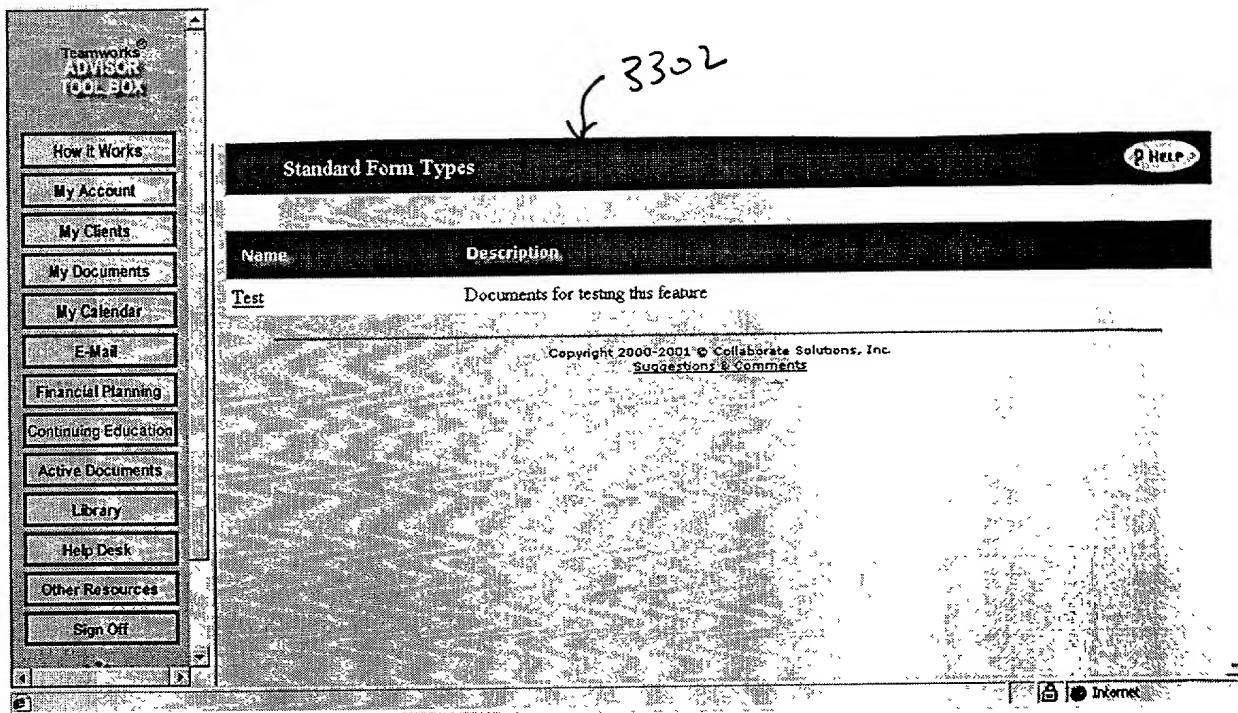


FIG. 33

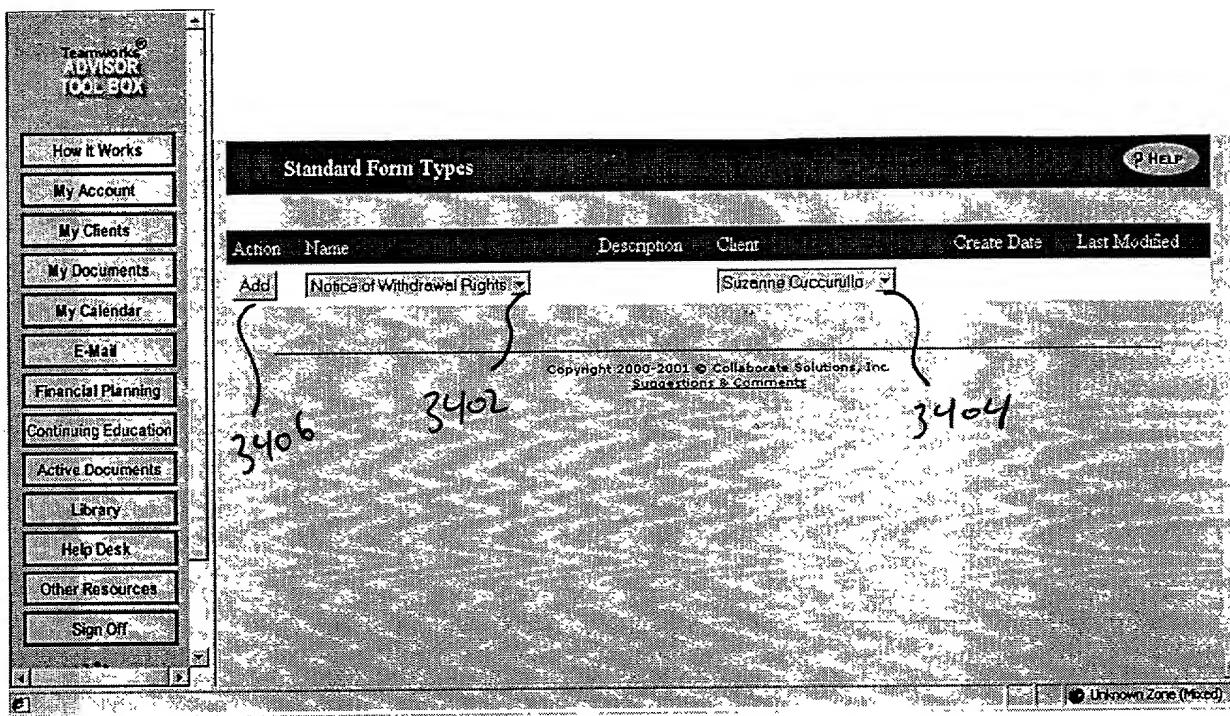


FIG. 34

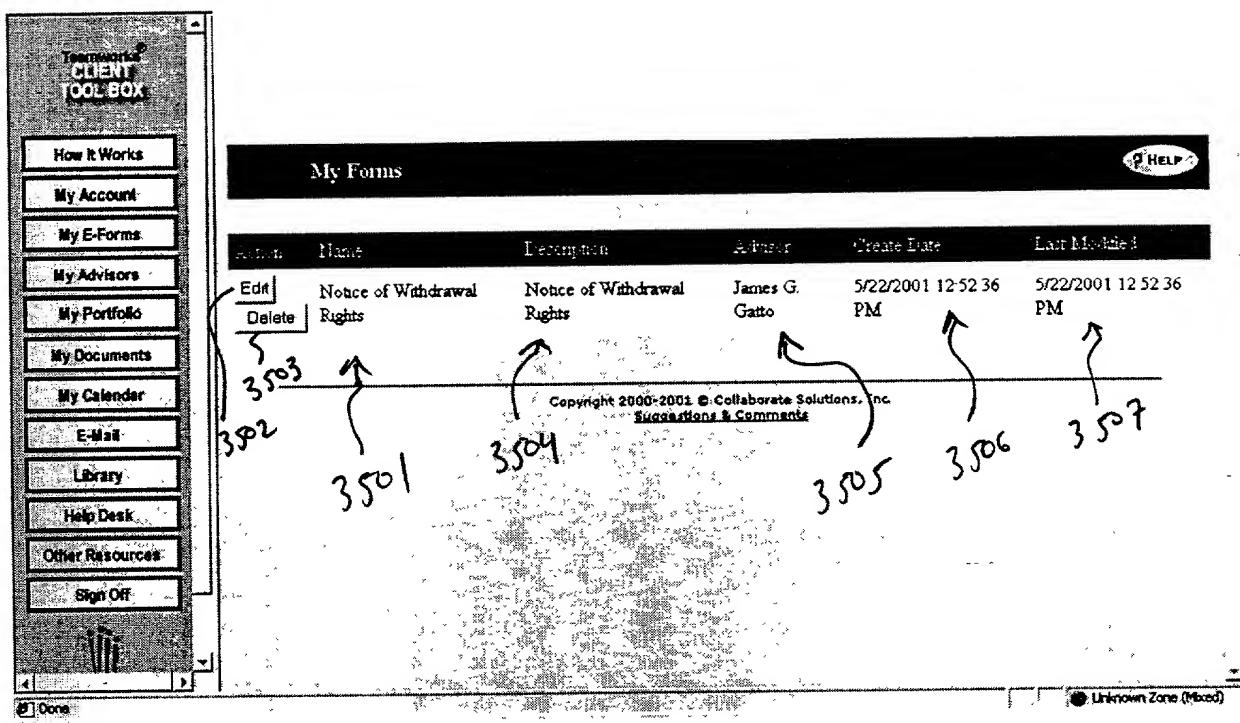


FIG. 35

3600

My Forms

Form Name: _____

Form Description: _____

Name of trust

Beneficiary Name: _____

Husband First Name: _____

Husband's Last Name: _____

Wife First Name: _____

Wife Last Name: _____

Gender of Insured/Grantor:

male

female

entity

Trustee name: _____

Number of trustees:

one

multiple

Co-Trustee name: _____

Save Back

3602

Unknown Zone (Mixed)

FIG. 36

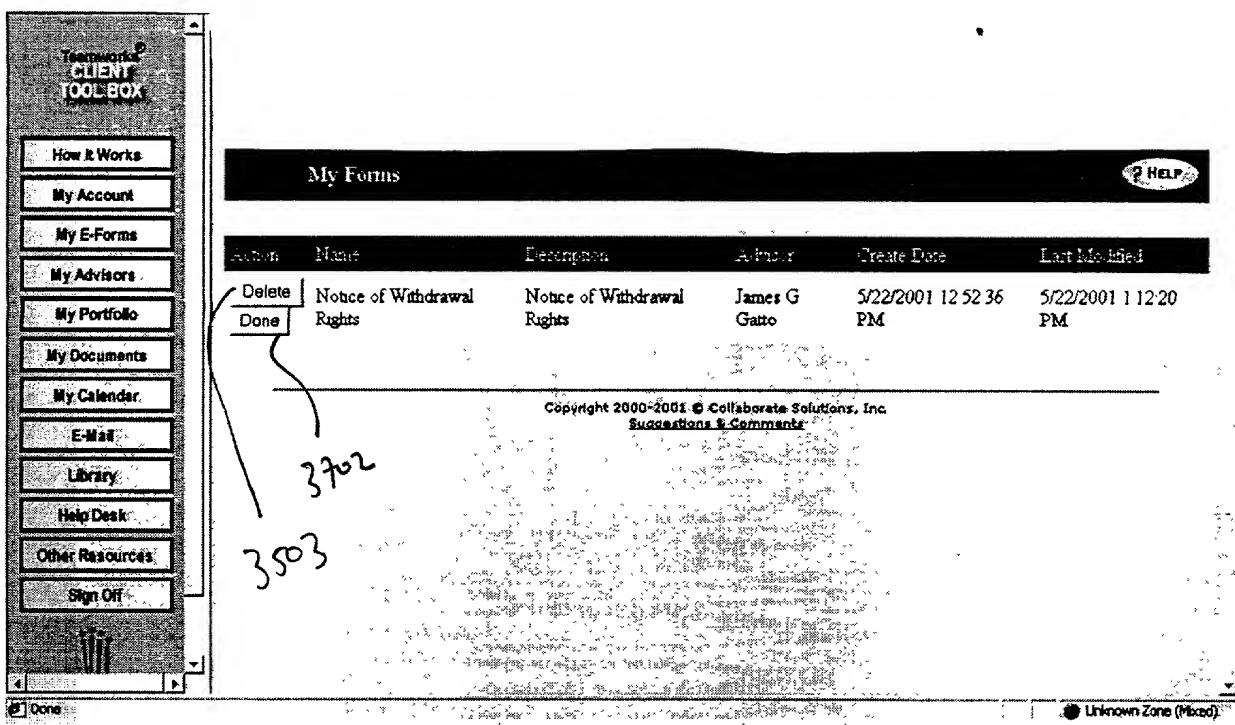


FIG. 37

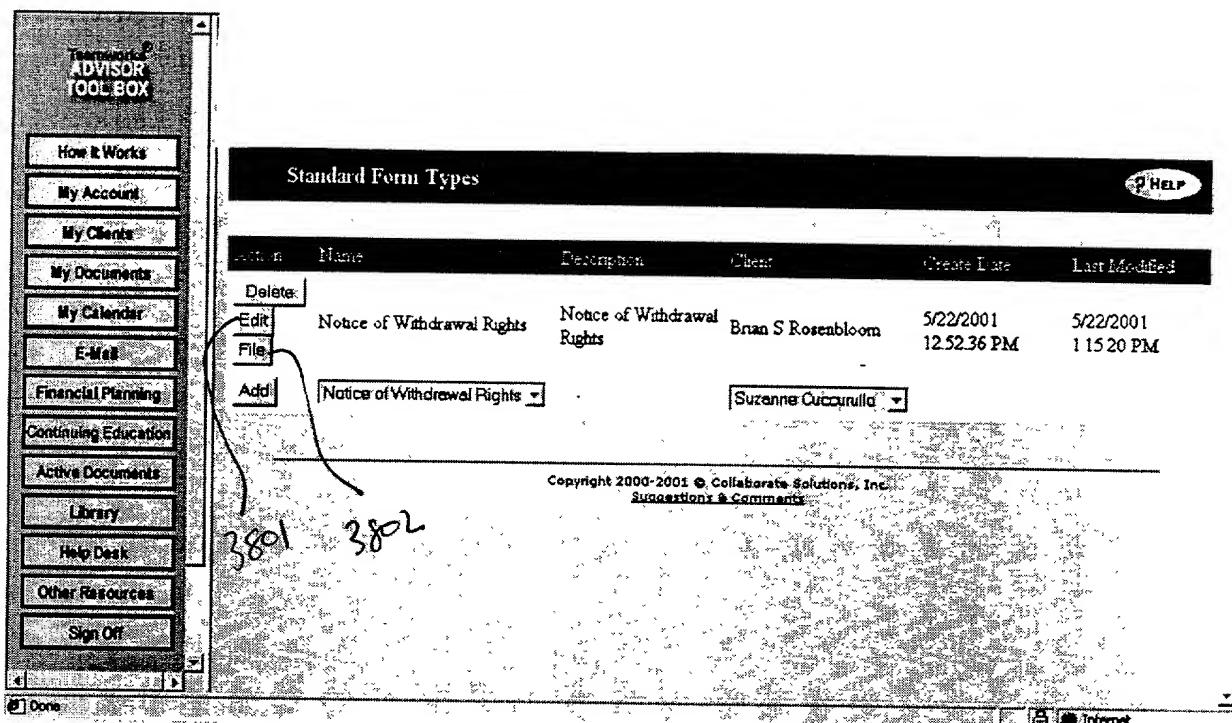


FIG. 38

Additional Modules 3901

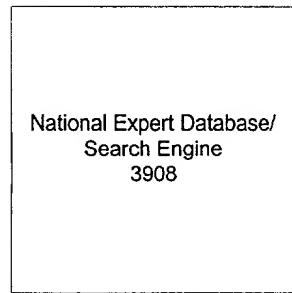
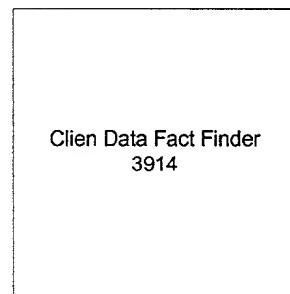
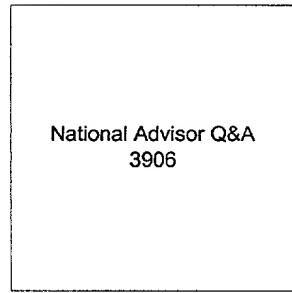
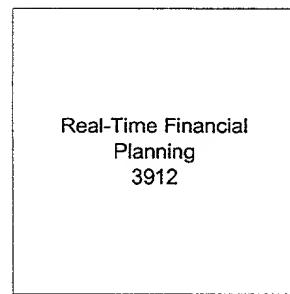
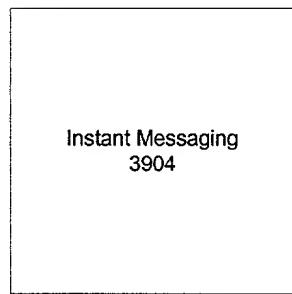
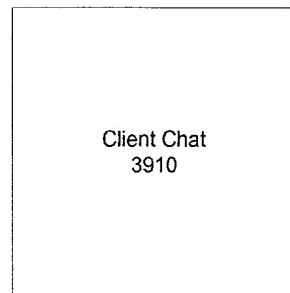
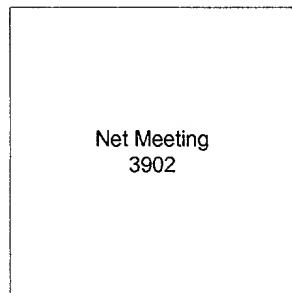


FIG. 39

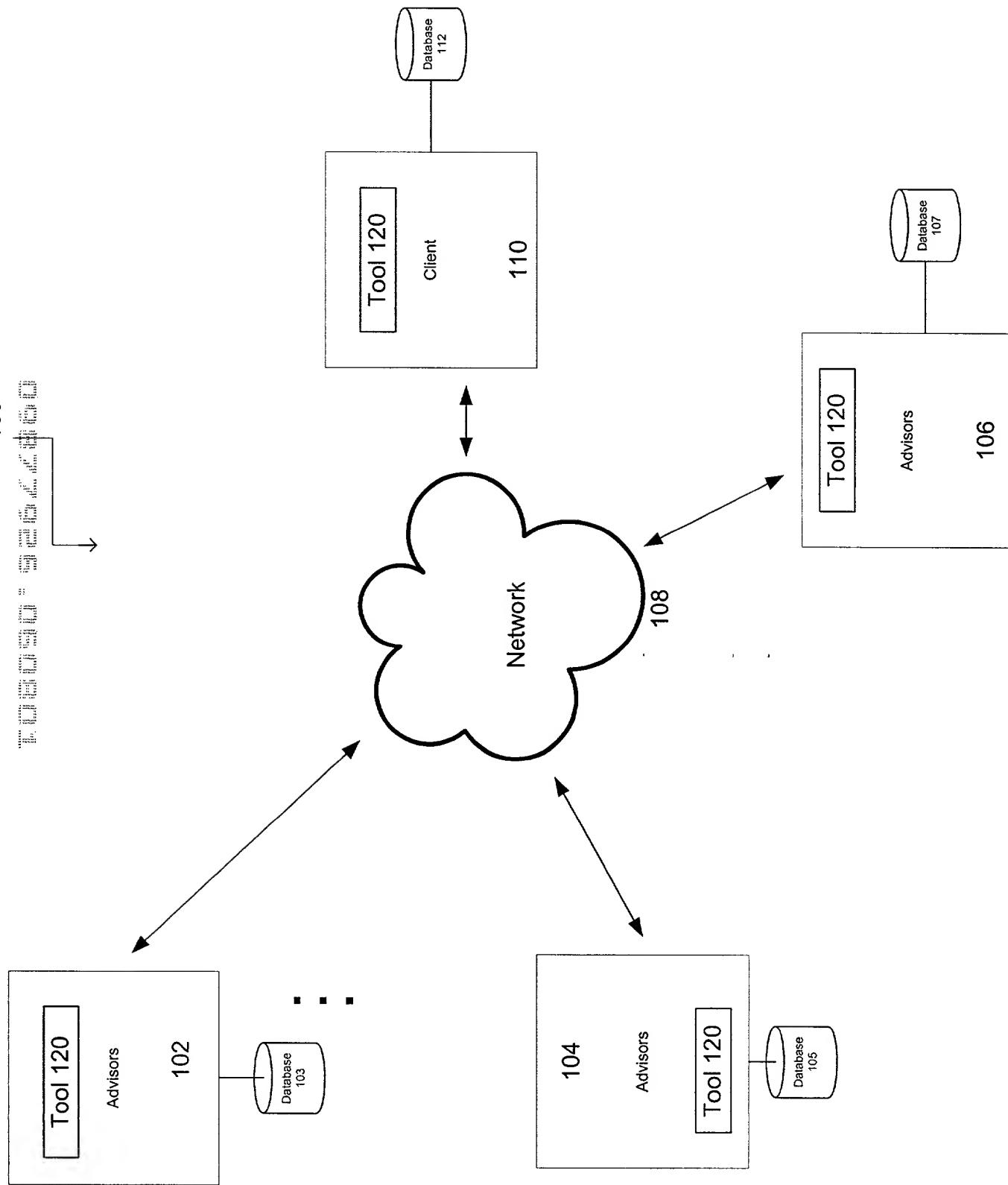


FIG. 40

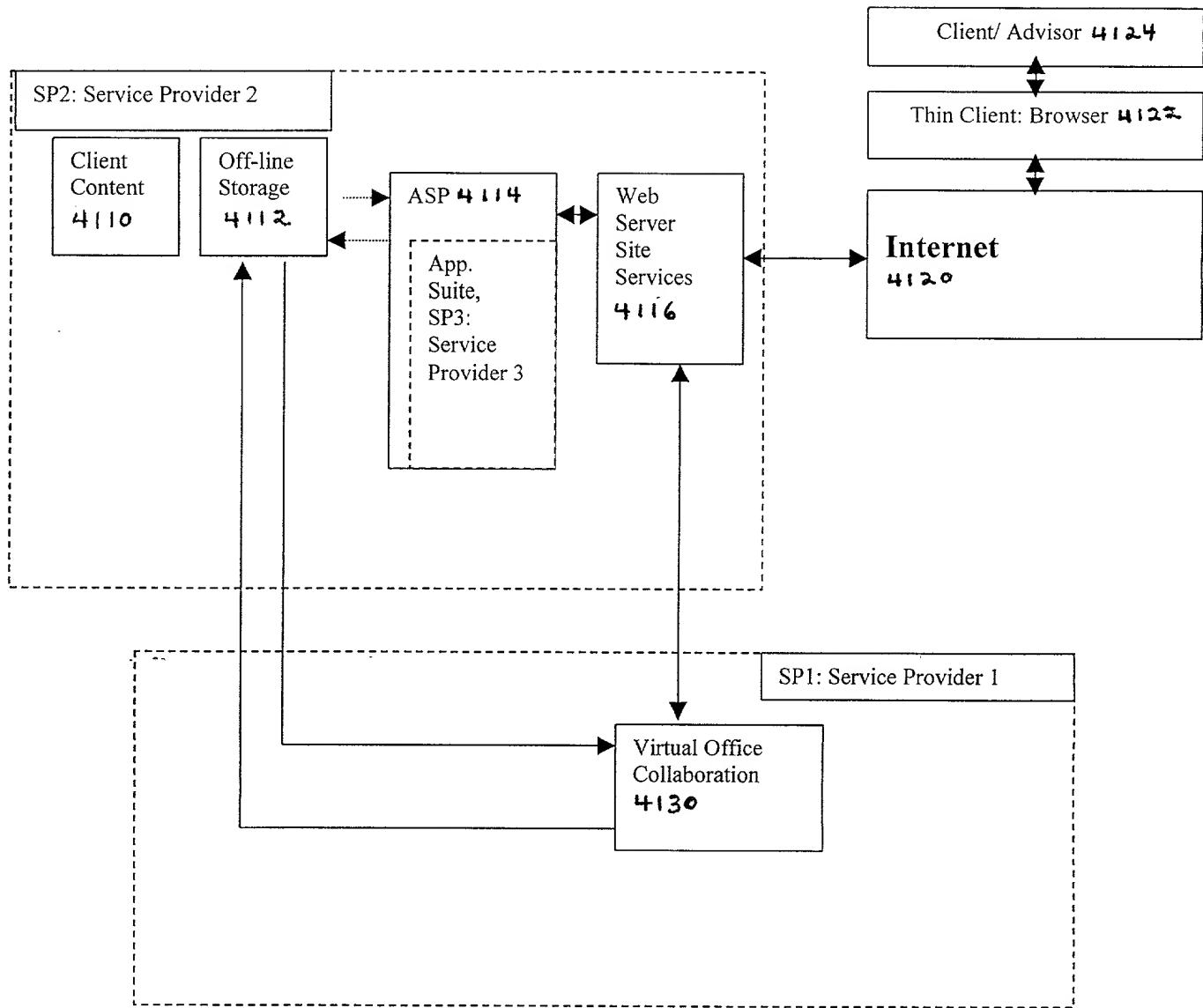


FIG. 41

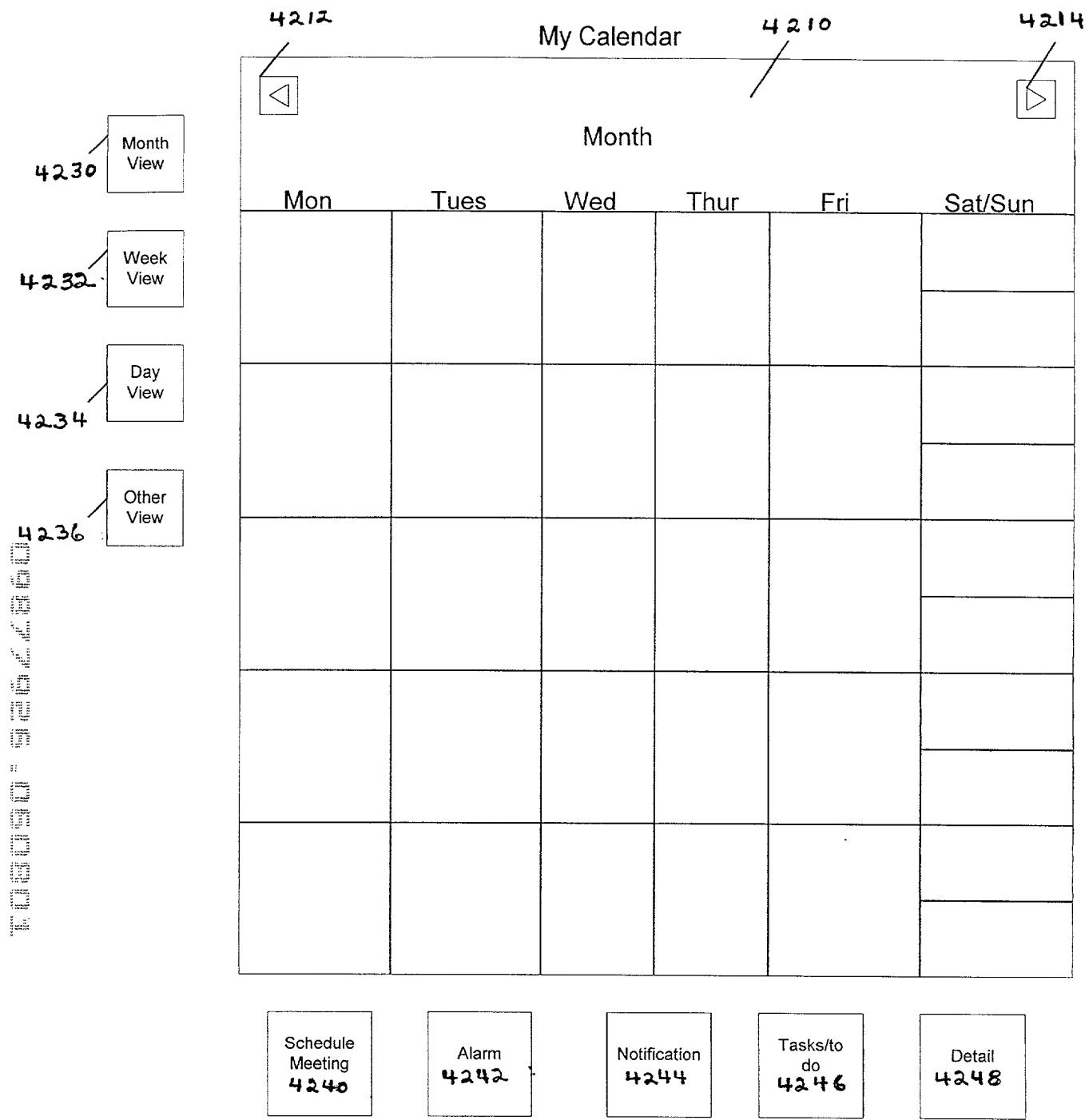


FIG. 42

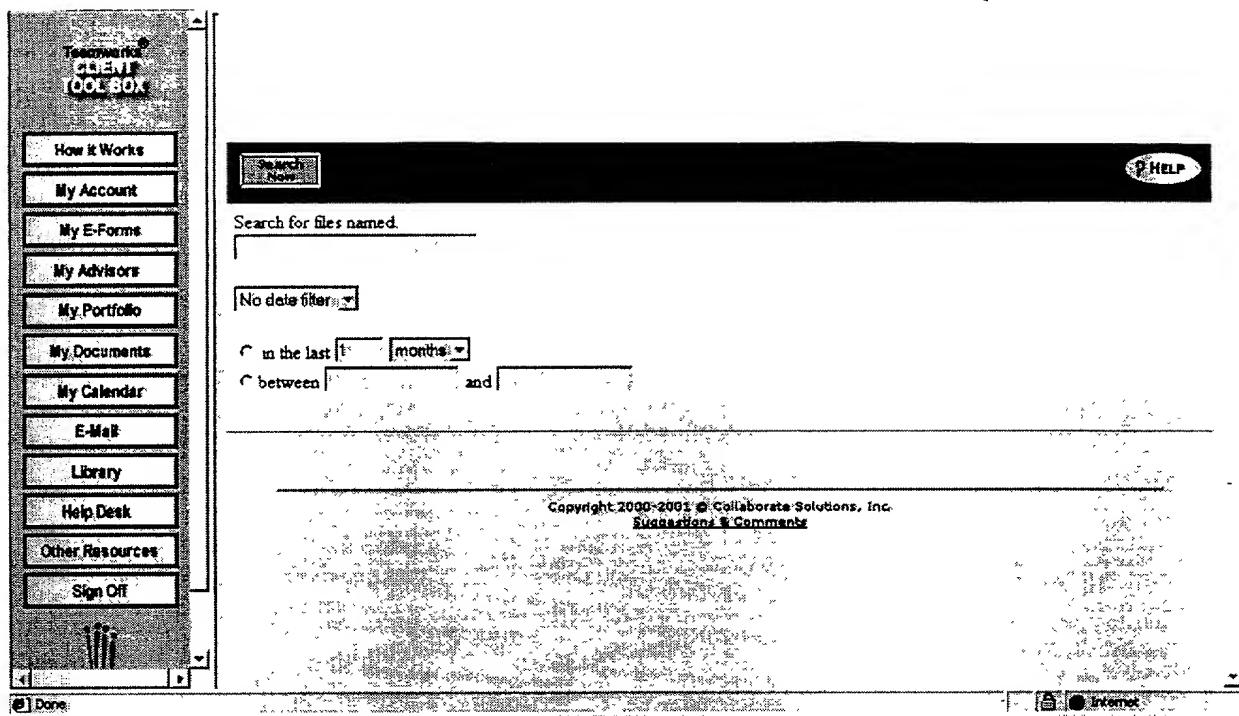


FIG. 43